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ABSTRACT

This report describes the use of Apple Macintosh computers in the Merriam Center Library (MCL) (Illinois), a small, specialized library located on the campus of the University of Chicago. The appropriateness of the Macintosh for library use and the introduction of Macintosh computers to MCL are briefly discussed, current computer applications are described, software use is summarized, and future plans are considered. In addition, a description of Macintosh files, which makes up the major part of the report, consists of seven articles originally published in the newsletter of the Apple Library Users Group: (1) "Periodicals Management with the Macintosh in a Special Library" (Edward J. Valauskas); (2) "Update on Periodical Management with a Macintosh in a Special Library" (Michael A. Wilson); (3) "Macintosh-Mainframe Applications in a Special Library" (Dennis A. Jenks and Edward J. Valauskas); (4) "Data Massage--the Red-Light District of Data Entry" (Dennis A. Jenks); (5) "Acquisitions Management with the Macintosh in a Special Library" (Michael A. Wilson); (6) "Using the Macintosh to Create a Circulation File for a Special Library" (Michael A. Wilson); and (7) "Publishing Bibliographies with the Macintosh and MacWrite" (Charlotte Ullman). A discussion of the future of the Macintosh in a library environment concludes the report. A listing of ten software sources is appended. (KM)

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The Macintoshed Library:

Uses of the Apple Macintosh in a Special Library

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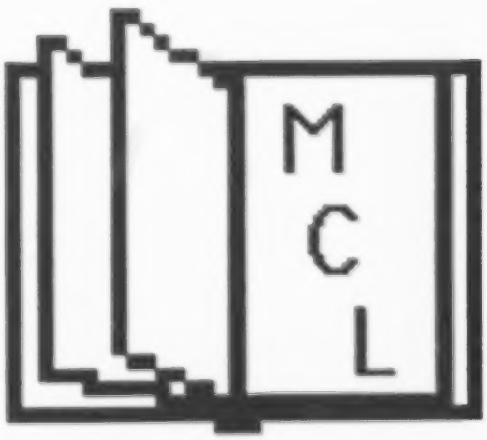

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Preface

Libraries face problems inherent in any organization handling large masses of information. These problems involve the collection, organization, and distribution of information in a variety of formats to a wide spectrum of clients. Computers, especially large mainframes, have long been touted as the vehicle to solve these problems of information management and service. It has only been quite recently that microcomputers have made an impact on the ways that libraries function. The Apple Macintosh is beginning to find a niche in the library world, not as an impassive electronic file cabinet, but as a friendly tool to manipulate information with the user in mind.

What makes the Macintosh so appropriate for libraries?

-- Its ease of use makes it possible to minimize training time for staff and patrons.

-- There is an abundance of software currently available, much of which is applicable to the administrative office, the reference desk, and the cataloging section. Macintosh-based software is flexible and adaptable. Limitations with the software often are a matter of the user's imagination in devising creative applications fitting a given problem.

-- The Macintosh encourages cooperation across functional lines in libraries. Files are created, shared, and improved upon with the use of templates designed around the features of basic software packages and the idiosyncrasies of the Macintosh.

With the recently announced expanded capabilities of the Macintosh II and SE, the role of microcomputers in libraries is on the verge of exploding into a variety of unimagined roles. It seems appropriate then to examine some of the current uses of the Macintosh in one library, to note this potential for growth and to champion the Macintosh's already discovered success as a library tool.

Introduction

Personal computers are beginning to play a large role in libraries, in making information accessible to both the library's staff and its patrons. In smaller, specialized libraries, computerization in the traditional sense has been an expensive proposition, involving enormous expenditures for equipment and demanding unheard-of expertise on the part of the staff, resulting in bewildering bibliographic data of questionable use to the library's clients. Smaller libraries cannot afford the financial and managerial burdens associated with a sophisticated computer system designed for academic and research libraries. Nevertheless, the promises of computerization are attractive to smaller libraries, which wish to abandon the tedium of maintaining extensive paper files and records to manage their collections.

Up to now, Macintoshes have been used as stand-alone workstations or in a mix with a variety of other types of equipment. The Merriam Center Library (MCL) has embarked on an ambitious program to use the Macintosh to fill the needs of a special library caught in this technologic gap between mainframes and a computerless environment. MCL has started a program of using Macintoshes in unified fashion to serve the technical needs of the library staff and to provide a highly interactive interface for the Library's public to access both internally generated computer files and those created by other bibliographic utilities.

Computers in the Merriam Center Library

Up to 1981, all routines in MCL were handled with paper files and manually maintained records to manage materials and information. In 1981, MCL worked with the University of Chicago Computation Center to develop a program to process bibliographic data for the production of MCL's monthly bibliographic publication, *Recent Publications on Governmental Problems*. The result of this effort was a complex program that runs on the University's Amdahl, which sorts and formats bibliographic information into a number of categories and produces offline hard copy for publication. From the beginning, there were problems with documentation. Vagaries in

the operation of the program, and communication lapses between the MCL Teleray terminal and the Amdahl, all were compounded by the staff's impatience with lost files and undecipherable error messages.

The Macintoshing of MCL

Early in 1986, The Merriam Center Library was faced with a problem that highlighted the limitations of the library's paper files.

MCL serves researchers in a number of non-profit, professional organizations housed in the Charles E. Merriam Center for Public Administration on the campus of the University of Chicago. The organizations include the American Planning Association , the American Public Works Association, and International Association of Assessing Officers. MCL was asked to produce a periodicals list for each of its 125 clients, containing not only all titles for the 800 journals, newsletters, and magazines that the Library receives, and their publishers, but also a listing of all periodicals that were being routed specifically to each client (for more details on this project, see the reprint of the article on periodicals management that follows). In the past, the preparation of the report required the full-time attention of two staff members for a minimum of several months, culling the data from the ever-faithful Kardex. Given time constraints and the lack of staff, it was not possible to repeat the previous manual route and make everyone happy.

A rather surprising solution was offered: to use the Macintosh to produce these specialized lists. A form was created to distill information from the Kardex into an appropriate format for the Macintosh. Over a two week period, data was transferred from the Kardex data on active periodicals to the form. Microsoft File was selected over more sophisticated programs, based simply on its cost and ease of use. With the daforms completed and the basics of File down, information was input from the forms into a specially created template, over the course of several weeks on a part-time basis. Lists were generated for MCL's clients on an ImageWriter and distributed. The Director, staff, and the Merriam Center researchers were all happy. The Macintosh had literally proven itself under fire. Other staffers started to explore the use of the Macintosh in their work. The "Macintoshing" of the Library began in earnest.

Applications

Currently MCL uses the Macintosh for the following tasks:

1) to manage its extensive collection of more than 800 periodicals, and over a thousand annual and irregular serials,

2) to control the acquisition of monographs and pamphlets,

3) to prepare issues of MCL's monthly publication *Recent Publications on Governmental Problems (RPGP)* by manipulating and editing bibliographic data,

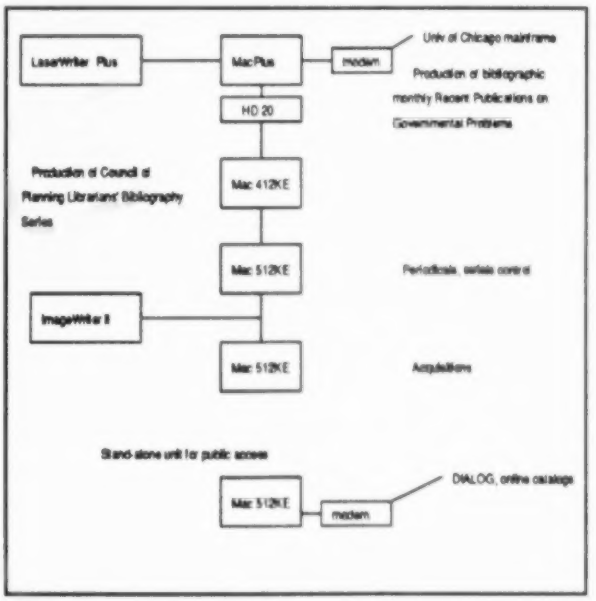
4) to access bibliographic files stored on one of the University of Chicago's mainframes,

5) to format and edit texts of bibliographies on planning and public administration, issued bimonthly by MCL for the Council of Planning Librarians,

6) to access bibliographic databases such as DIALOG and online catalogs of research libraries for MCL patrons, and

7) to handle the billing of *RPGP's* subscribers, keeping track of payments and generating invoices.

Configuration: Hardware



Macintosh Configuration in the Merriam Center Library

MCL accomplishes these tasks with the following:

4 Macintosh 512K Enchanced computers, with 800K external drives,
1 Macintosh Plus computer, with Apple HD20SC & 800K External Drive
1 LaserWriter Plus,
1 ImageWriter II with AppleTalk board,
1 U.S. Robotics Courier 2400 baud modem, and
1 Apple Personal modem (1200/300 baud).

Three of the Macintosh 512KEs and the MacPlus are connected through AppleTalk with the ImageWriter and LaserWriter Plus. One Macintosh 512KE serves as a stand-alone unit for public use, in the Reference area.

Software

Since we have been concentrating our limited funds on procuring hardware, we've only worked with a limited range of software packages. Apple's MacWrite and Microsoft's File have been the workhorses for the Library staff along with MacTerminal and Kermit for telecommunications. Graphic artists in the Merriam Center have found MacPaint and MacDraw helpful for illustration production. Merriam Center researchers have used MacProject for scheduling grant proposals and timetables.

A list of software in use includes the following:

Apple's MacWrite, MacPaint, MacTerminal, MacDraw, and MacProject, Microsoft's File and Word, with other software including the telecommunications packages Red Ryder and Kermit.

Future Plans

By the end of this year, the Merriam Center Library hopes to begin cataloging with the use of OCLC's bibliographic records, establish an electronic bulletin board for Merriam Center researchers and other interested parties in the academic community, and to refine the public access to MCL's bibliographic files by making available more Macintoshes dedicated to the Library's clients. Overall, the success of the Macintosh in MCL has encouraged the staff to imagine a variety of new uses and the Library's patrons to expect even greater access to MCL's 50,000 monographs, 100,000 pamphlets, 800 periodicals, and 1,000 serials.

Description of Macintosh Files

This section consists of a series of articles published in the newsletter of the Apple Library Users Group, on Macintosh applications in the Merriam Center Library. Several of the articles have been updated with previously unpublished addenda. Templates described in these articles are available from the Apple Library Users Group, or directly from the Merriam Center Library.

The original citations for these articles are:

1. Edward J. Valauskas, "Periodicals Management with the Macintosh in a Special Library," *Apple Library Users Group Newsletter*, vol. 4, no. 4 (October 1986), pp.25-27.

2. Michael A. Wilson, "Update on Periodicals Management with a Macintosh in a Special Library," previously unpublished.

3. Dennis A. Jenks and Edward J. Valauskas, "Macintosh-Mainframe Applications in a Special Library," *Apple Library Users Group Newsletter*, vol. 4, no. 4 (October 1986), pp.30-31.

4. Dennis A. Jenks, "Data Massage: the Red-Light District of Data Entry," previously unpublished.

5. Michael A. Wilson, "Acquisitions Management with the Macintosh in a Special Library," *Apple Library Users Group Newsletter*, vol. 5, no. 1 (January 1987), pp.34-35.

6. Michael A. Wilson, "Using the Macintosh to Create a Circulation File for a Special Library," *Apple Library Users Group Newsletter*, vol. 5, no. 2 (April 1987), pp.44-46.

7. Charlotte Ullman, "Publishing Bibliographies with the Macintosh and MacWrite," *Apple Library Users Group Newsletter*, vol. 5, no. 2 (April 1987), pp.47-48.

Periodicals Management with the Macintosh in a Special Library

by

Edward J. Valauskas

Special libraries face a number of unique problems unknown to academic and school libraries, thanks to their unusual collections, limited staffs and budgets, and demanding clientele. A variety of strategies have evolved to address the difficulties surrounding technical services, all aimed at accelerating the processing of materials. These abbreviated methods have been adapted quickly to the advantages provided by microcomputers, as tools to process information about the status of a collection. Special libraries are in a netherworld of technical processing; they are too small and too impoverished to afford the larger online systems of academic libraries, yet they are too large to continue to handle information about materials with paper files. Personal computers and file management programs provide a tantalizing possibility of reducing the sheer mass of paper files and the associated drudgery for their keepers. The question then becomes one of devising a way of manipulating commercially available file management programs creatively to handle the problems of a special library, minimizing the impact of the conversion on the staff, the library's patrons, and the records. This article examines how one special library has tried to tackle this problem, in processing its collection of journals.

The Library of the Charles E. Merriam Center for Public Administration (better known as the Merriam Center Library or MCL) was formed some fifty years ago to serve a group of national, non-profit agencies which decided to locate their headquarters in Chicago's Hyde Park neighborhood near the University of Chicago. The Library serves the staffs of the American Planning Association, the American Public Works Association, the International Association of Assessing Officers, students and faculty of the University of Chicago, and the public. It is supported by user fees and by subscriptions to its monthly publication *Recent Publications on Governmental Problems (RPGP)*. The Library's collection contains in excess of 50,000 monographs, 100,000 reports, 800 periodical titles, and 1,000 annual and irregular serials.

The processing of periodicals has always been a time-consuming and thankless chore, especially given the ephemeral nature of specialized newsletters and their publishers. With access to the libraries of the University of Chicago and the Center for Research Libraries, MCL attempts to collect periodicals outside the normal scope of its academic neighbors, specifically meeting the needs of its clientele. These periodicals create their own special set of problems, compounded by the demands of the staffs of the professional organizations to have specific titles routed to their attention. The size of the paper file containing all information on MCL's periodicals discouraged any attack by the Library's staff to edit it in any reasonable manner.

Developing the File

Demands by the Library's clientele for an up-to-date list of MCL's periodical holdings forced a re-evaluation of the periodical paper file. The decision was made to convert the file to an automated format. As the first step in the conversion of the records, a paper form was developed to distill all the information in the paper file for all active, currently received periodicals into a series of discrete fields. This form listed the first set of fields: title, ISSN, publisher, publisher's address, zip code, frequency of publication, subscription expiration date, price, source, retention policy, route list, and notes. Information for all 800 active periodicals was transferred manually from the paper file to the forms on a part-time basis over the course of a month.

The Microsoft File program was chosen by virtue of its relatively low cost, its simplicity, and, most importantly, its flexibility. The initial file was set up by creating a separate indexed field for each defined category deemed important from the paper file. This configuration permitted maximum flexibility in searching for specific information about a given periodical. All fields were formatted as text fields, except the subscription expiration field (formatted as a date field) and the price field (formatted as a number

field). Fields with sequences of digits such as the ISSN and zip code fields were not formatted as number fields because of File's penchant for dropping initial zeroes, e.g., in the zip code 02138, the 0 would disappear after data entry. After use of the form for several months, it was decided to add several new fields to the records: a subject heading field and a field (the " check in" field) to keep track of the receipt of issues. Lengths of fields were determined by the maximum amount of information encountered as the records were converted; the title, publisher, publisher's address, subject heading, source, route list, notes and "check in" fields are the longest.

Field name	Maximum length (in characters per line)
Title	*138*
ISSN	*11*
Publisher	*138*
Publ. Addr.	*138*
Zip Code	*13*
Freq. of Publ.	*64*
Subj. Heading	*138*
Subscr. Exp.	*64*
Price	*64*
Retention	*64*
Route List	*138*
Check In/Vol	*138*
Notes	*138*
Source	*138*

Table 1: Length of fields in periodical file

The MCL periodicals file has some peculiar fields which need explanation. The source field indicates the manner in which the Library obtains a specific title. Not all periodicals are obtained on subscription; in fact, only 17% of the 800 periodicals are secured through subscription. Many periodicals are received so that their contents may be indexed in the Library's bibliographic monthly RPGP; others are received through the professional organizations that the Library serves. The source field helps Library staff to resolve delivery problems by identifying to whom the Library can complain about non-receipt of a given item. The retention policy field informs the staff and the Library's patrons how long a given periodical is kept in the collection. Due to lack of space, the Library cannot retain most periodicals indefinitely; this field conveniently identifies the holdings of a specific title.

Products from the File

Given File's flexibility with its report format, a number of custom-designed products have been generated from the master periodical file. The first product was a route list for each staff member whom the Library serves. Each person received a list of periodicals (and their publishers) which had been routed to them routinely in the past. In addition, a list of all 800 periodicals was sent to each individual so that he/she could select new titles as well. This service, which was manually produced in the past, was enthusiastically received. A list of all titles and publishers was also generated for use at the reference desk; this list is updated every 30 to 60 days. Monthly lists are generated to anticipate subscription expirations, based on the information contained in the subscription expiration field. Potential bottlenecks in routing journals to problem readers are quickly avoided utilizing the route field. The names in this field were prioritized in order of staffs within organizations and their reputation for moving or not moving materials. Information is more accessible, permitting quicker and more accurate reponses to questions from MCL's clientele.

Of course, no situation is entirely idyllic. There are some features which could be added to enhance the usefulness of the file. The Library is attempting to devise a claims field to the master list, in order to identify missing issues. At this point, the "check-in" field must be scanned routinely to identify a problem and then correlated with information in the source field. The "check-in" field at some point in the near future will bloat with volume and issue data; this information should be linked in some fashion to the retention policy field to weed materials as required.

Future Applications

Conversion has begun on another paper file, which contains information on annuals and irregularly issued serials. These publications are routinely problematic-- issuing agencies change, become extinct, or revive in totally unexpected fashions. This new file roughly resembles the periodical file, with some changes in the number and length of fields. There has been some experimentation with MCL's paper file for in-process monographs, that is, books and pamphlets on order or in the backlog awaiting cataloging. The file is massive, containing some 145,000 slips, recording information on book orders for a number of years. Conversion of the

entire file is impossible; freezing the paper file at some given date and processing all orders via an already-designed form seems the best option.

Overall, the Macintosh has been well received by both Library staff and Library patrons. The Macintosh is also used for DIALOG searches, processing of bibliographic information for the Library's monthly RPGP, and the preparation of a series of bibliographies for the Council of Planning Librarians and the American Planning Association. It has made a tremendous impact on MCL's day-to-day routines, allowing the Library to expand its services and to pursue actively new endeavors. Within the strictures of staff and budget, the Macintosh has brought the Merriam Center Library into the twentieth century before its end.

Update on Periodical Management with a Macintosh in a Special Library

by

Michael A. Wilson

In the previous article, Edward J. Valauskas describes how the Merriam Center Library (MCL) manages periodicals using a Macintosh with the Microsoft File application. This article, written for the October 1986 *Apple Library Users Group Newsletter*, needs to be brought up to date.

The article mentioned above states that problems either had appeared or would appear concerning our claiming process and 'bloated' check-in fields. Happily, those and other problems have been resolved.

A new field, the 'Date Received' field, was instituted to help the staff initiate claim procedures. This field records the date of the last received issue of a particular title. By sorting the entire file by this field, titles which are lax in coming can be claimed. It is not a perfect solution, but it does help a little. To check for skipped issues, the issue not received is noted and then claimed manually. Soom MCL will be able to produce claim letters automatically with the Macintosh.

The 'bloated' check-in field problem required formulating a new file that would record the title and check-in fields of periodicals. The file is duplicated and cleared of all fields except the title and check-in fields. Then, the entire record or set of records is copied into the new file. One must remember to paste 'by name' as the fields are arranged quite differently. I create two files in this fashion, and a new file for checking in current materials a 'Retired Records' file. Problems with an extended file shouldn't be

encountered for quite a few years.

Another file was created for foreign language publications. MCL receives about 30 foreign language journals and newsletters. While there is only occasionally a need for them, they must be kept. The main file is duplicated once more, removing in the process all of the records for English-language publications, and inserting all of the foreign language periodicals. Now a record of all foreign language publications that come into MCL can be used without disrupting the normal main file.

Two new files were created for periodicals that had ceased publication or were cancelled by MCL. One file, the 'Discard' file, holds the records of the 'dead' journals for one year. It is an exact duplicate of the records in the main file. The second file, the 'Junk' file, is a duplicate of the main file with all fields removed except for the title and notes fields. 'Dead' records get dumped into the first or 'Discard' file. At the end of one year, all records from the 'Discard' file get dumped into the second or 'Junk' file where they will remain permanently.

Macintosh-Mainframe Applications in a Special Library

by

Dennis A. Jenks

and Edward J. Valauskas

Many libraries use mainframes as depositories for large bibliographic files,and given their storage capacity and sorting abilities this is not surprising. Since 1980, the Merriam Center Library has used a mainframe to access and store bibliographic data. Wihin the past few months, we have begun to use a Macintosh to control our periodicals collections. Next we discontinued our use of dedicated terminals to access bibliographic files and began to use the Macintosh, an Apple modem, and MacTerminal communications package instead. Dennis A. Jenks, editor of the Library's monthly bibliographic journal, discusses some of the advantages and disadvantages that the Library staff have discovered in the course of using microcomputers to access and produce mainframe files.

Publications, Mainframes, and the Mac

"Mainframe communications? Who would want to talk to a mainframe computer? For some of us the mainframe is a problematic fact of life. Total reliance on the mainframe, especially when renting time on it, is a drain on resources. One way to mitigate the situation is to let somebody else bear the burden. Macintosh works for us.

Prior to the Mac-mainframe arrangement we used a Teleray 1061 terminal-mainframe setup. This forced us to use Superwylbur, a line-by-line text editor, to compile data. The Macintosh transition brought full screen edit capabilities.

There is no doubt that the Mac is friendlier, more accurate, more fun to use, and less aggravating than working directly on the

mainframe. It is also a great time and money-saver.

A comparsion of data between the pre-Mac era and the present age of enlightenment reveals the following:

-Staff time has been cut by approximately 50 percent since July 1986, when we began producing with Macintosh. This has enabled us to publish other bibliographies, also Macintosh produced.

-Charges for time connected with the mainframe text editor have been cut by approximately 50 percent.

-Batch job charges for running the production of programs have decreased by approximately 15 percent.

In addition, most printing of hard copy is performed on an in-house ImageWriter II or LaserWriter Plus. The savings are estimated to be nearly 70 percent. Storage of hard copy records is no longer necessary since the data is stored on diskettes, which take a fraction of the space and are always available for printing when hard copy is needed. Records are also easier to access with the *search* feature of MacWrite than by thumbing through dusty file cabinets-- and you do not get paper cuts from keyboards.

Using the Macintosh to such an advantage requires the ability to transfer data from one machine to another. This turns out to be as easy as ordering a pizza or calling Mom and Dad. With a modem and Kermit, the mainframe communications software, one merely dials a connection and uses the pulldown-menu items to get the data flowing. Uploading and downloading are achieved with one terminal, since Kermit doubles as a port to the mainframe.

Easier word processing, greater accuracy, less mainframe connect time, cheaper printing...the advantages of the Mac-mainframe connection far outweigh the one true disadvantage-- a tied-up phone line which makes it difficult to call out for pizza."

Other Uses

Access to DIALOG is provided to the research staffs of the American Planning Association, the American Public Works Association, and the International Association of Assessing Officers, all located in the Merriam Center. Each organization receives $25 worth of DIALOG searches per month at no charge, with all fees in excess billed to the requesting research group. In the past, a Texas Instruments 300 baud terminal/printer was used to search DIALOG, with the reference librarian processing the request. The baud rate and the primitive conditions of the terminal discouraged people from using DIALOG. Researchers turned to DIALOG only in sheer desperation, and the $25 of DIALOG access was often not used.

In June, 1986, researchers were given a brief introduction to DIALOG via the Macintosh. The use of DIALOG has increased dramatically, and the $25 allottment disappears early each month as the number of searches has increased. Researchers access DIALOG via the Macintosh with the librarian's assistance. Searches are reviewed by the library staff and materials are retrieved from the collections of one of the University of Chicago libraries or internally, with the help of a student page. Overall, the Macintosh has become quite a popular tool for accessing DIALOG at the Merriam Center.

We currently produce all of our bibliographic records locally without utilizing the information available in large bibliographic databases such as OCLC. This procedure is time-consuming and produces records that are highly variable in quality. This situation will soon remedy with the library's participation in OCLC. The Macintosh and the PBS (Personal Bibliographic Software, Ann Arbor, MI) package will be the means by which the Library will utilize OCLC. A description of the Mac-OCLC connection will be forthcoming in the near future.

Data Massage: the Red-Light District of Data Entry

by

Dennis A. Jenks

At the Merriam Center Library we are easing into producing *Recent Publications on Governmental Problems* on the Mac. As of now we employ a hybrid system:

1. The cover and news section is done entirely on the Mac with Microsoft Word 3.0 and MacDraw.

2. The main body of bibliographic listings is compiled on the Mac with Microsoft File. The resulting database is coming into its own as the primary library catalog.

3. The MS File file is transferred as a text file using Kermit to an Amdahl mainframe which invokes a series of programs to sort and format the text correctly.

Cover and News

This is by far the easiest, and most polished, section of *RPGP*. There are no special tricks here. The LaserWriter Plus has improved the look of these sections to a degree that a year ago we would have never envisioned. What you see is what you get.

Bibliographic Entries Compiled in MS File

By itself, MS File is a very easy and useful tool. Making a form in which to enter bibliographic data is easy. But once you have a form, translating that barebones look into a nicely formatted bibliography that people can read and use is more difficult. Different books have different looks: some have one author, some have two, some have no true *authors*, but editors. What is required is a being so intelligent that it has nothing to do all day but think of the different combinations and how a readership or a library user might like to see the data. The Merriam Center Library uses a series of programs and macros on an Amdahl mainframe at the University of Chicago. Our mission is to produce data in MS File that is formatted according to the strictures of the mainframe and the Script formatter.

Headaches

The problem we have found in compiling a bibliographic listing is that MS File fields are separated by tab characters (TABS) and each entry by a carriage return (CR). Our mainframe production programs require three character code prefixes beginning a line to delimit each field. The basic task at hand is to transform a garble of the form:

<Entry1-Field1><TAB><Entry1
Field2><TAB>...<Entry1-LastField>
<Entry2-Field1><TAB><Entry2-
Field2><TAB>...<Entry2-LastField>
<LastEntry-Field1><TAB><LastEntry-
Field2><TAB>...<LastEntry-LastField>

to a garble of the form:

<Entry1-Field1>
<Entry1-Field2>
<Entry2-LastField>
<LastEntry-LastField>

It is not a matter of swapping arms for hostages, but CRs for TABs.

Fortunately, MacWrite has a very useful trick built in: a TAB can be *pasted* into the *Change* dialog box, and changed globally with a *change all* command. However, the CR cannot be *pasted* in such a manner. The solution, then, is to use a trick in MS File.

When entering data in MS File, pressing a carriage return moves the cursor to the next field, effectively placing a TAB in the text file. If, however, one uses the option key (OPT) in conjunction with a CR, a carriage return is embedded *within* the field itself. The resulting text file treats the OPT-CR as a regular CR. Thus:

<Text> + <OPT-CR> + <CR> = <Text, CR,
TAB>

We then use MacWrite to edit out the TAB leaving the desired string, <Text, CR>. This means that each field will contain the mainframe's code prefix in the initial position as required.

MS File has a few more quirks that require attention. Punctuation in any given field will produce data that when saved as text, will appear within a set of quotations marks. These are easily edited out with a global *change* command. If one wishes to place quotation marks within a file, one must use a dummy character that one later changes to quotes (after globally eliminating quotation marks). A list of field names separated by TABs begins a MS File file saved as *Text Only*. This is easily removed, though.

The Proof is in the Proofreading

If data is going to another machine to be processed, there should be a post-data-massage proofreading. Proofreading of MS File files is easily done by producing hardcopy with a *Print* Command. The MS File forms used to produce *RPGP* use fieldnames as clues as to the code prefix designated for each field. For example, the internal reference number, an arbitrarily assigned delimiter of each entry, is named *.RF* to cue the inputter. The corresponding prefix code is, coincidentally, ".RF". Since data is entered directly into a comprehensive database, we include a field that identifies a given entry with a specific input batch. We then produce batches of worksheets for specific time periods. Since each piece is delimited by the *.RF* reference number field, it is easy to place a page break between each entry. The worksheets are printed and then slipped into books for proofreading against the title page. The data is then named uniquely and placed in a folder awaiting later corrections and transfer to the Amdahl mainframe at the University of Chicago.

Acquisitions Management with the Macintosh in a Special Library

by

Michael A. Wilson

In previous articles, the Merriam Center Library (MCL) has shown how the Macintosh and Microsoft File have helped to automate our periodicals file and process bibliographic information for publication. This article describes a variant of the MS File for periodicals, developed for acquisitions.

History and Implementation

The MCL staff decided that the acquisitions file should be put online. Our paper file was started in 1976 after a previous file had been closed; to date, the paper file containing acquisitions records consists of about 30,000 entries, arranged alphabetically by title. With this number of records, cross-referencing was impossible and so was an efficient claim system. We needed a better, faster and easier system of management. The Macintosh held the key.

The first thing we wanted to do was to convert the paper file to an automated file. However, this was not possible with the constraints of our present staffing. A few rough back-of-the-envelope calculations indicated that it would have taken over four man-years of inputting at eight hours per day! Finally, we decided that we would simply close the paper file.

Our next task was drawing up a form for our file. Since our paper forms contained all the necessary information, it was an easy process to format it into a Microsoft File version for use on the Macintosh.

Uses and Problems

In the beginning, we came very close to scrapping the entire project. We found ourselves doing the same job twice. Since we changed over from the paper file to a Mac file in the middle of the year, all orders dated 1986 could be found either in the paper file or on the Mac. Orders had to be searched in both files. The solution to that was simply to bite the bullet and wait out the year. We reasoned that in 1987 all of our orders would be in the computer, so the duplicate work would eventually stop. A decision was made to file orders for pre-1986 imprints in the old file to avoid other duplicate work.

We also had a problem with the actual ordering process. The acquisitions paper file was one large file, rather than a series of small sub-files for the series of routines involved in ordering and processing material. We discovered that it was necessary to break up the Macintosh files into a series of smaller files each following a step in the acquisitions process. For example, as we choose items to order, we would immediately enter them into the initial, undifferentiated Mac acquisitions file. Within twenty-four to forty-eight hours, we would issue letters ordering these pieces. Within that time frame, other orders were placed, occasionally duplicating orders already in process. The solution was to make separate sub-files for each of the steps involved in ordering materials. These files were labelled in the following fashion:

Have- A file consisting of records for items that have been received or for items that have been ordered (orders placed with publishers).

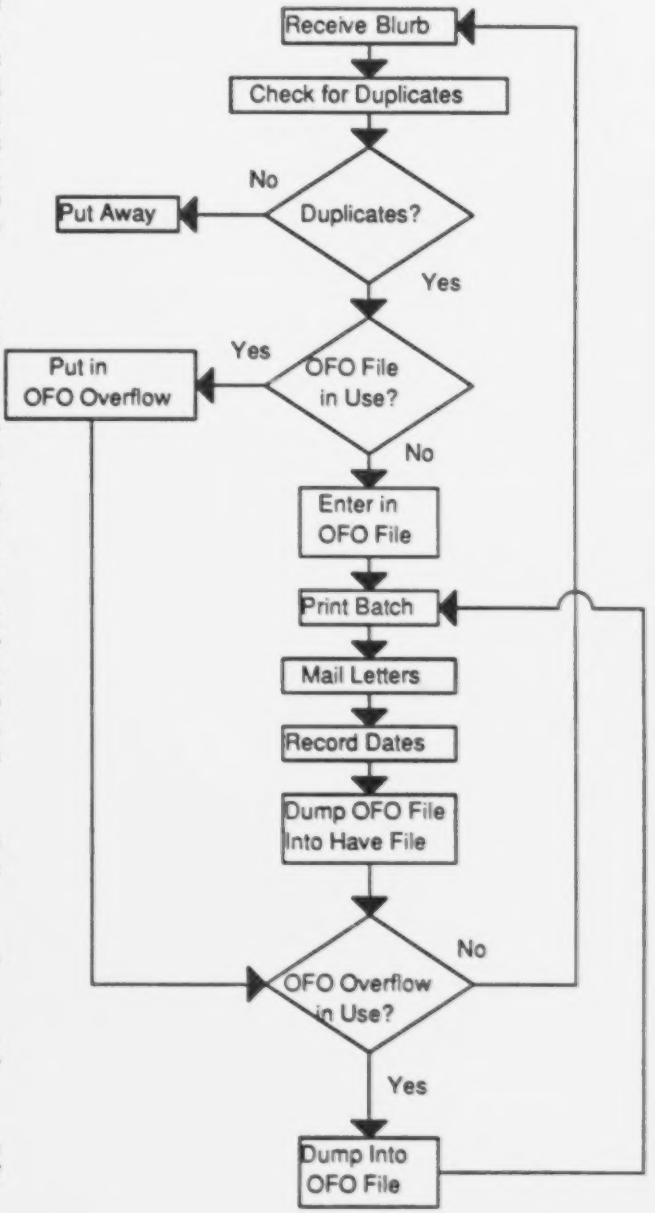
OFO- Records for items to be ordered, before actual orders are placed with publishers.

OFO Overflow- A supplemental file for items to be ordered when OFO file in use by another staff member.

OFXX- A follow-up file, to check on the status of orders not received over the course of sixty days.

Since the introduction of these files, our system has run much more smoothly, with few problems.

An order is processed as follows:



1. The reference librarian notes a publication of interest in a catalog, blurb, bibliography, etc. or a researcher indicates the need for a specific item not in the collection.

2. Bibliographic information is sent to the acquisitions technician, who checks for previous orders in the acquisitions files on the Macintosh, and in the paper file, if the imprint date is 1986 or earlier.

3. If the item has not been previously ordered or cataloged, an order will be placed, and a record will be created in the OFO file (or the OFO Overflow).

4. A printout of the OFO file is made and orders are sent to the publishers.

5. Order dates are recorded in the records in the OFO file.

6. All orders in the OFO file are then moved to the HAVE file.

7. When the item arrives, it is checked against the HAVE file, and processed for cataloging.

8. Items not received within 2 months are moved to OFXX file. Records in the file are printed and follow-up letters are sent to the respective publishers.

In summary, the acquisitions process has been rendered easier, faster, and less bulky than ever before.

The Acquisitions file of the Merriam Center Library was produced on Macintosh 512K Enhanced computer using the Microsoft File software package. A template of the file is available through the Apple Library Template Exchange or directly from the Merriam Center Library.

Using the Macintosh to Create a Circulation File for a Special Library

by

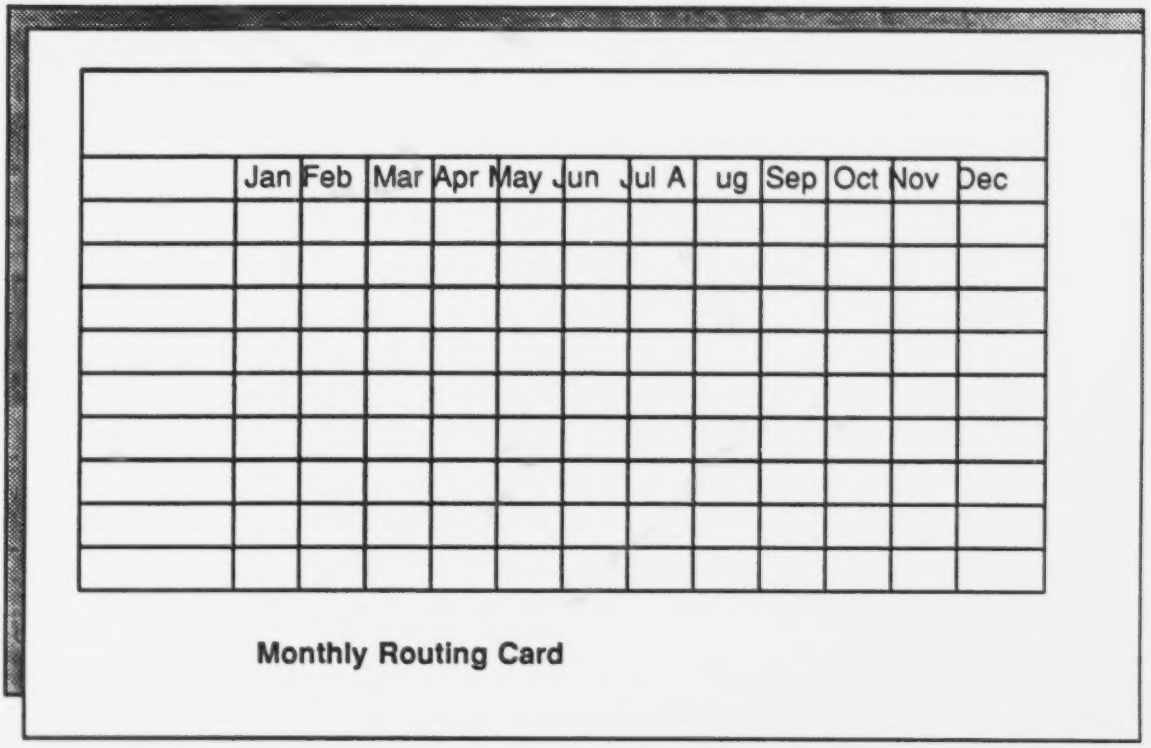
Michael A. Wilson

In previous issues of the *Apple Library Users Group Newsletter*, the Merriam Center Library (MCL) has shown how the use of the Macintosh has helped to automate our periodicals and acquisition files; and communicate with mainframes. We have since converted our circulation file from a manual paper file to a Macintosh application file using Microsoft File.

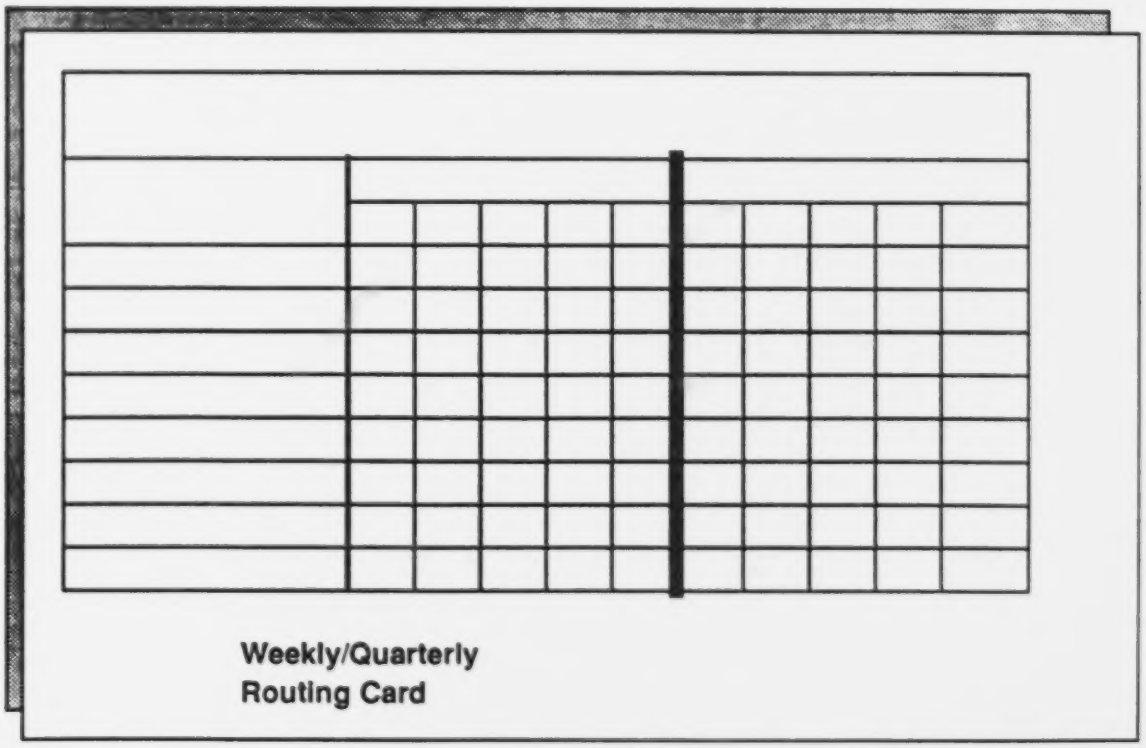
Using the Macintosh, we have had little trouble managing the library's serials collection. However, only half of the process was completed; there still remained the problem of tracking the circulation of journals. Periodicals are circulated in two fashions - researchers request certain titles to be routed to their attention, and patrons charge out issues for use in their offices. This Macintosh file addresses the former type of circulation.

For a long time, devising a routing procedure always seemed to be a major problem, given the fact that approximately 65 researchers in the Merriam Center wanted to see a number of periodicals routinely. It seemed that somehow, it was just too complicated to be able to record the travels of quarterly, monthly and weekly journals without generating far too many records or separate files.

Our old procedure consisted of using 3x5 index cards on which columns and rows of boxes were printed, forming a matrix on each card. But, monthly cards differed from weekly and quarterly cards.



Monthly Routing Card



Weekly/Quarterly Routing Card

After adding fields that contained the names of patrons to whom items were routed or charged out to, the year of publication, and the number of the exact copy routed, the record looked like this:

Circulation template

1	Editor and Publisher								
	1987	Mon.(weekly)/Yr.(quarterly)							
		Jan.	Feb.	Mar.	Apr.	May	June	July	Au
				May					
	Route to:	2	9	16	23	30			
	Gerson	XXXXXX	XXXXXX	XXXXXX	6/5	6/5			XX
	Britton	XXXXXX	XXXXXX	XXXXXX					XX
	Schwab	6/5	28	6/5					XX
	Jenks								

At MCL, we used Microsoft File as our basic applications program and I decided to stick with it. I wanted to construct a matrix format, to match the index cards as closely as possible. I wasn't sure how or if a matrix would fit in with a program like Microsoft File. I then went about the trial and error process of creating a form with enough fields to cover what I needed for all of the periodicals' frequencies (monthly, weekly, quarterly). I solved this problem by adding two extra fields. One field would contain either the name of the month, if weekly, or the year, if quarterly. The other field would then contain the date or month, respectively.

This system is not perfect, but now we have an automated circulation file which will allow us to sort and search by any and all fields. We feel that it will allow us to keep track of delinquent routes simply.

Publishing Bibliographies with the Macintosh and MacWrite

by

Charlotte Ullman

Introduction

The Merriam Center Library began publishing in 1932. *Recent Publications on Governmental Problems (RPGP)*, a monthly bibliographic journal in the field of public administration has been published since then, and is still going strong. Until 1980, *RPGP* was produced manually. Since that time, it has been produced on an Amdahl mainframe computer, using Superwylbur. Right now, *RPGP* is partially Macintosh-produced, and total Macintosh production is in the near future.

In July of 1986, the Merriam Center Library began publishing the Council of Planning Librarians (CPL) Bibliography Series, as well. Now the Library is successfully publishing both products, with the indispensible help of the Macintosh 512KE, MacWrite (v.4.5), an ImageWriter, and a LaserWriter.

When I began working on the CPL Bibliography series, there was a previous editorial history of producing the bibliographies very irregularly. Each bibliography was painstakingly typed. When an error was found, for example a *hte* was really *the*, a whole page would have to be retyped. Manual production made the bimonthly deadlines difficult to meet. And the editors spent long hours producing a product that looked less than polished.

Many factors contributed to the aura of unprofessionalism that haunted the series. For example, the placement of page numbers was inconsistent and margins at the top of the pages varied widely. Since every book and periodical had to be underlined, the underlining often interfered with ascenders and descenders, making it difficult to read anything nearby. Bibliographies were typed with different typewriter fonts, and double dashes--instead of em dashes--added to the series' kitchen-table look.

Production Details

First, I set the indentation marker at the page margin. The format is left justified.

I input the title of the book or periodical on the first line. Sometimes the title spills over to the second line, and it is indented automatically by the tab, which is set by the margin marker, as just before two inches.

When I've finished inputting the bibliographic information, I RETURN twice and hit the TAB. This puts me in the right place for the annotation, and it keeps the whole annotation indented. When I've finished the entry, I hit RETURN three times. One RETURN puts me back at the margin. The other RETURNs give me the correct spacing between entries.

After the bibliography is input with this simple ruler format, I print a proof copy of the bibliography on the ImageWriter. The proof copy is input in fourteen point Geneva, because I find the larger Geneva type easier to read. I don't touch the pagebreaks when the text is at this stage, because the type style and size affect where the pages will be broken.

Once the text is in good shape, I reduce the type size and change it to the Times font. The final copy is in twelve point Times, which is elegant and easy to read. Twelve point Times is smaller than typewriter type, and it's kerned so more copy can fit on a page. This reduces paper and printing costs.

Once I've revised the text, reduced the type, and changed the font, I can break the pages online. Then I can make refinements such as changing the type size of the headings, or converting certain key elements to boldface. Another Macintosh timesaver is having a template for the title-page. I just insert the new information when needed, print it, and save it as a new document.

The Macintosh and MacWrite allow me to make the publication look more professional. For example, the title of books and periodicals are now italicized instead of underlined, which is a vast improvement both in style and readability. The Macintosh also makes diacritical marks easy.

Apple products have been invaluable tools in the production of the CPL Bibliography Series. The Macintosh, MacWrite (v.4.5), the ImageWriter, and the LaserWriter have delivered this once obtuse bibliography series from library shelf damnation into a damn nice publication.

Future of the Macintosh in the Library Environment

"It is as though man were surviving in the depths of this sea of information in a bathyscape. Life in this bathyscape is simple, protected as it is from the pressure of the vast quantities of data. Every now and then man peers through the windows of the bathyscape to obtain facts that are necessary for some purpose or other. ... The information windows must be designed so that man, with his limited capabilities, can locate the data he wants and obtain simple answers to questions that may need complex processing.

In the world of the future...man will appreciate that computers are as essential to his needs as are water mains and electricity. He will not see the computers. He will not understand their programs. He will merely use the information windows. And these, he will come to regard as vital. If man of future decades were to lose his information windows, he would be plunged into the darkest chaos."
(James Martin. *Design of Man-Computer Dialogues.* Englewood Cliffs, N.J.: Prentice-Hall, 1973, pp. 6-7)

What will the shape of the library's information window be in the near future? Will it be in the form of a personal computer using parallel processors, hooked to read/write optical drives that store hundreds of megabytes of bibliographic information, producing hardcopy on color laser printers? Some computer authorities have predicted the availability of such computers within the next decade (see, for instance, Reed McManus, "In Pursuit of Tomorrow's PC," *PC World*, vol. 5, no. 5, May 1987, pp. 260-261.) Others have predicted the power of today's Cray supercomputers in computer workstations by 1990 (see, for instance, C. Gordon Bell, "The Future of Scientific Computing," *Computers in Science*, vol. 1 no. 1, 1987, pp. 4+). Will librarians be able to use these technological advances to truly create an invisible information window?

Serendipity will play a large part in the future of personal computers in libraries. Personal computers have made automation available to a wider variety of libraries than ever before and have permitted some changes in the traditional ways that libraries have handled information. Is it reasonable to expect miniCrays dotting the desks of librarians, machines that feature parallel processors acting as filing systems, sorting gigabytes of bibliographic data? Certainly, there will be an expansion of the storage capacities of personal computers, tied to software that can sort larger and larger bibliographic files. If it is possible to imagine these sorts of information appliances, librarians should also be prepared to imagine uses in entirely different fashions, rethinking the ways in which librarians package resources and dress their information windows.

The Macintosh provides a glimpse of the future of personal computing, especially in its newest forms, the Macintosh SE and II. These devices will provide new opportunities for libraries, that have been once limited to more sophisticated institutions with large financial and technical resources. Computing power once beyond the grasp of smaller and specialized libraries is available in the form of the newest Macintoshes. The imagination is no longer restricted in creating new ways of making information available. This pamphlet has tried to demonstrate that point, by illustrating the uses of the Macintosh in a small, specialized library. In some ways, these first, crude steps in using the Macintosh in a library are only a very rough beginning of what appears to be a long association of the personal computer and the public's access to information. The Macintosh is truly an information window as envisioned by James Martin 14 years ago.

Appendix: Software Sources

Kermit
Available on CompuServe in the MAUG file
CompuServe
PO Box 20212
5000 Arlington Centre Blvd.
Columbus, OH 43220
800/848-8199

MacDraw™
Available from your local Authorized Apple Dealer
Apple Computer, Inc.
20525 Mariani Avenue
Cupertino, CA 95014
408/996-1010

MacPaint™
Available from your local Authorized Apple Dealer
Apple Computer, Inc.
20525 Mariani Avenue
Cupertino, CA 95014
408/996-1010

MacProject™
Available from your local Authorized Apple Dealer
Apple Computer, Inc.
20525 Mariani Avenue
Cupertino, CA 95014
408/996-1010

MacTerminal™
Available from your local Authorized Apple Dealer
Apple Computer, Inc.
20525 Mariani Avenue
Cupertino, CA 95014
408/996-1010

MacWrite™
Available from your local Authorized Apple Dealer
Apple Computer, Inc.
20525 Mariani Avenue
Cupertino, CA 95014
408/996-1010

Microsoft® File
Microsoft Corporation
10700 Northup Way, Dept. 150
Bellevue, WA 98009
800/547-4000

Microsoft® Word
Microsoft Corporation
10700 Northup Way, Dept. 150
Bellevue, WA 98009
800/547-4000

PageMaker
Aldus Corporation
616 First Avenue, Suite 400
Seattle, WA 98104
206/441-8666

Red Ryder
Available on CompuServe in the MAUG file as Shareware
CompuServe
PO Box 20212
5000 Arlington Centre Blvd.
Columbus, OH 43220
800/848-8199